

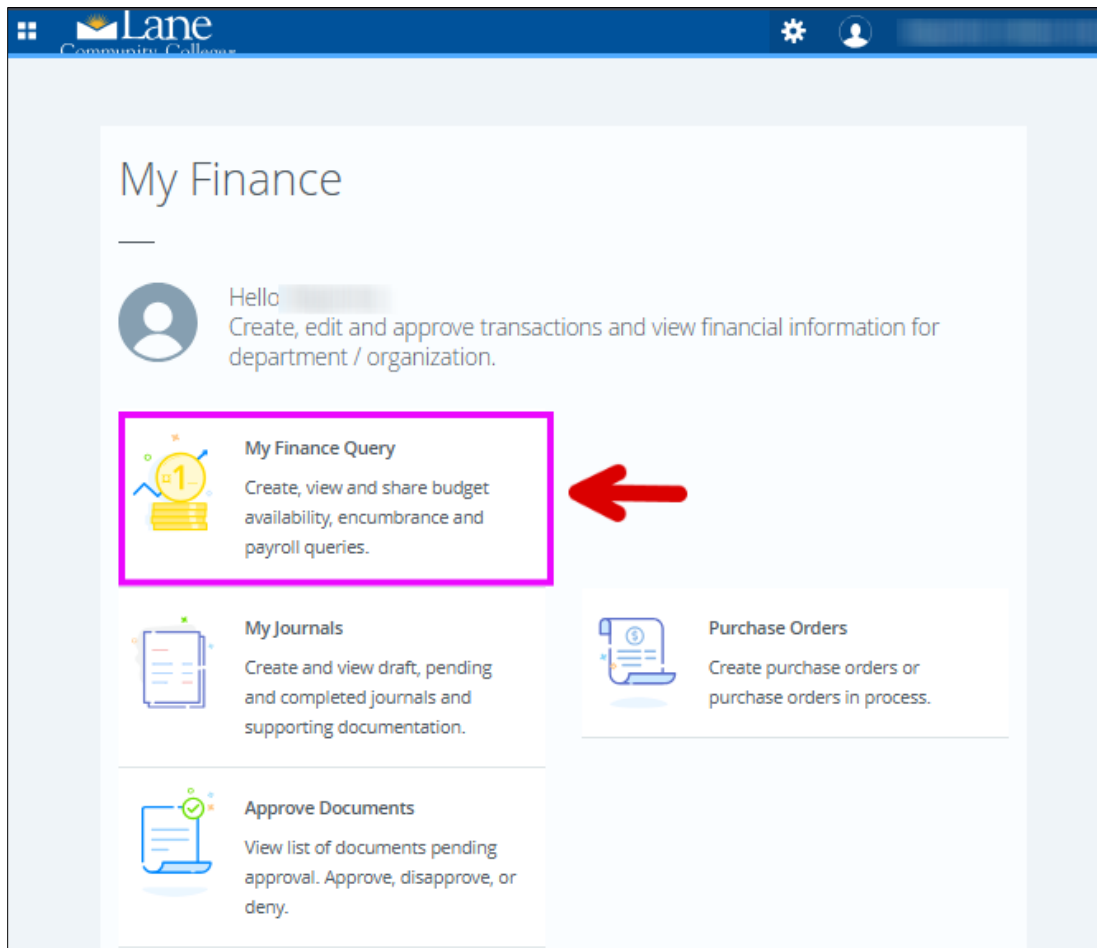
MyLane 9 Budget Queries

Budget Queries: This allows to check the financial status of particular Funds, Organizations, Accounts, Programs or a combination of all. Access to these will be based on the security access established for each individual staff member.

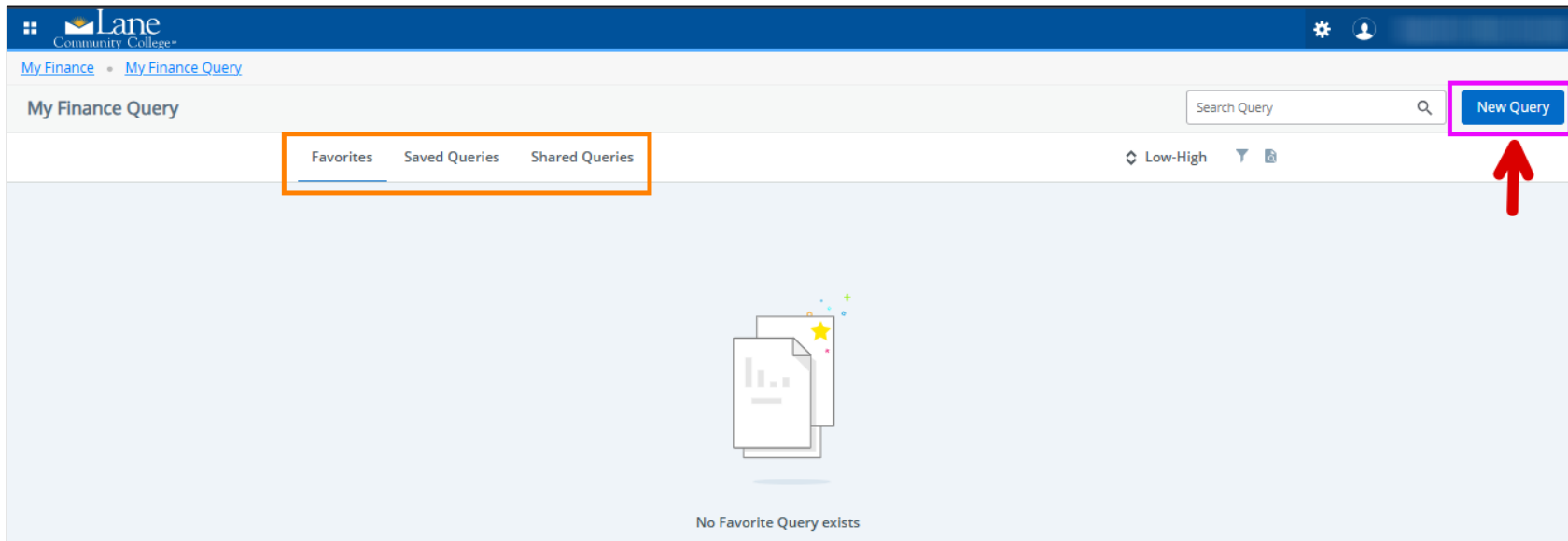
Step#1: Log in to the platform

Link: <https://my.lanecc.edu/FinanceSelfService/ssb/financeCommonDashboard>

Step#2: Once in the My Finance dashboard select “My Finance Query”.



Step# 3: Click on New Query to start a new query. If navigating to an already established query, can choose from Favorites, Saved Queries or Shared Queries (all visually shown in orange rectangle).



Step# 4: Create New Query: This pop-up is broken down into a few Sections that help facilitate the entering of details pertaining to the query you are trying to create.

Values:

1. Select Query Type: Select the type of query wanting to perform. Budget Status by Account shows the most detail that is drillable.
2. Fund: In this area you can type or scroll to the Fund for the query. Can also enter “%” which will serve as a wildcard.
3. Organization: In this area you can type or scroll to the Organization for the query. Can also enter “%” which will serve as a wildcard.
4. Account: In this area you can type or scroll to the Account for the query. Can also enter “%” which will serve as a wildcard.
5. Program: In this area you can type or scroll to the Program for the query. Can also enter “%” which will serve as a wildcard.

The 'Create New Query' pop-up form is shown. It has a title bar with a close button. The form is organized into several sections. The 'Select Query Type' section has a dropdown menu set to 'Budget Status by Account', with a red circle '1' next to it. The 'Values' section has a text input field containing 'L Lane Community College', with a yellow callout box pointing to it that says 'Should always remain as "L Lane Community College"'. Below this are fields for 'Fund' (with a red circle '2'), 'Organization' (with a red circle '3'), 'Account' (with a red circle '4'), and 'Program' (with a red circle '5'). Each of these fields contains a wildcard character '%'. At the bottom, there are dropdown menus for 'Activity' (set to 'Choose Activity') and 'Location' (set to 'Choose Location').

6. Fund Type: Can choose a fund type or simply leave this area unselected.
7. Account Type: Can choose an account type or simply leave this area unselected.
8. Commitment Type: Can choose a commitment type or simply leave this area unselected.
9. Include Revenue Accounts: Check mark this box if the query being created should also include revenue accounts.
10. Fiscal Year: Enter the fiscal year pertaining to the query being created
11. Fiscal Period: Enter the fiscal period pertaining to the query being create. If query is for year-to-date information, select fiscal period 14.
12. Comparison Fiscal Year: If comparing data to another fiscal year go ahead and enter that fiscal year there otherwise leave on “none”.
13. Comparison Fiscal Period: If comparing data to another fiscal period go ahead and enter that fiscal period there otherwise leave on “none”.

Create New Query

Fund Type

Choose Fund Type

Account Type

Choose Account Type

Commitment Type

All

☒ Include Revenue Accounts

Fiscal Year*

2023

Fiscal Period*

14

Comparison Fiscal Year

None

Comparison Fiscal Period

None

Operating Ledger: This is the area where the columns being brought in can be customize. Select columns you would like to include in your query. The “i” next to each of the options can be clicked on to see additional information in regards to that option. Once all selections have been made click on “Submit”.

Operating Ledger

☒ Adopted Budget ⓘ
 ☒ Year to Date ⓘ

☐ Budget Adjustment ⓘ
 ☒ Encumbrance ⓘ

☐ Adjusted Budget ⓘ
 ☐ Reservation ⓘ

☐ Temporary Budget ⓘ
 ☐ Commitments ⓘ

☒ Accounted Budget ⓘ
 ☒ Available Balance ⓘ






SUBMIT

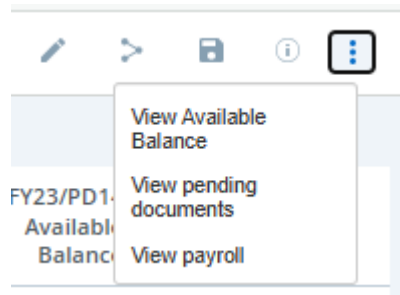
Step# 5: Query Results: Once the query has been submitted the query results will be seen. MyLane 9 has some new features and functionality. Some details of those will be offered below. The feature that is most noticeable is the “Health” column. This visually shows the health of each of the FOAP lines within the query.



Lane Community College										
My Finance • My Finance Query • Budget Status by Account										
Budget Status by Account										New Query
Query Results										
Account	Account Title	Program	Health	FY23/PD14 Adopted Budget	FY23/PD14 Accounted Budget	FY23/PD14 Year to Date	FY23/PD14 Encumbrances	FY23/PD14 Available Balance		
610000	Operational Supplies	510000	✓	\$7,000.00	\$4,442.00	\$0.00	\$0.00	\$4,442.00		
610200	General Materials & Supplies	510000	✓	\$2,000.00	\$2,000.00	\$0.00	\$0.00	\$2,000.00		
610300	Advertising	510000	⚠	\$1,000.00	\$1,000.00	\$1,445.00	\$0.00	(\$445.00)		
612100	M&S from Lane Printing & Graphics	510000	⚠	\$1,566.00	\$1,566.00	\$879.39	\$0.00	\$686.61		
614000	Staff Travel	510000	⚠	\$2,000.00	\$0.00	\$0.00	\$0.00	\$0.00		
614200	Routine Staff Travel	510000	⚠	\$0.00	\$2,000.00	(\$686.37)	\$0.00	\$2,686.37		
Report Total (of all records)				(\$13,566.00)	(\$11,008.00)	(\$1,638.02)	\$0.00	(\$9,369.98)		

*As a reminder, all data points in blue font are drillable for further detail.

Features:

-  Can edit query by clicking on this icon.
-  Allows ability to share query by clicking on this icon.
-  Allows the ability to save the query by clicking on this icon.
-  Allows to view the parameters (details) of how the query was created.
-  Gives option to view other financial details. Those additional financial detail options can be seen in screenshot.



-  Allows the creation of computed columns
-  Allows the data to be downloaded as an Excel file.